

INDEFINITE DELIVERY INDEFINITE QUANTITY CONTRACT REQUEST FOR PROPOSALS

SECTION I: Contract Details and Statement of Work

1. SUPPLIES OR SERVICES AND PRICES/COST

1.1 Contract Type

1.1.1 This is an Indefinite Delivery Indefinite Quantity (IDIQ), firm fixed priced (FFP) contract subject to task order assignments. Time & Materials (T&M) task orders may be also issued under this contract when conditions warrant their issuance. The Contracting Officer will determine task order type on a case-by-case basis. Services will be defined and priced through individual task orders. In the performance of task orders, the Contractor shall use firm fixed hourly rates for labor categories in accordance with Clause 1.3 (Fully Burdened Labor Rate Schedule and Other Direct Costs (ODCs) for Base and Option Periods) below in their cost proposals. Cost reimbursement material expenses associated with efforts under the materials contract line item number(s) (CLINs) must be supported by an invoice. Contractor-furnished domestic travel required in support of CLINs will be reimbursed at actual cost, in accordance with Federal Travel Regulations (FTRs) and supported by invoice. Per diems will be reimbursed, as appropriate, in accordance with the General Services Administration's (GSA) per diem rates. No fee or profit will be paid on reimbursements for travel and per diems. In the performance of task orders designated as T&M, the Contractor shall propose a total cost estimate using loaded labor rates agreed to in the contract and other direct costs on an actual cost basis.

1.1.2 In order to facilitate the negotiation of task orders, the Contractor shall propose a FFP rate for each labor category proposed. The rates shall be fixed for the base period and each option period. In order to aid the Medicaid and CHIP Payment and Access Commission (MACPAC or the Commission) in its evaluation of the proposed rates, all offerors shall provide cost and pricing data to demonstrate how the rates were determined. Travel expenses shall not be included in any rates that are proposed as part of the establishment of the base IDIQ contract(s). Travel costs will not be requested or considered until the task order stage, and at that time shall be based on the rules outlined within the FTR (41 Code of Federal Regulations (CFR), Chapters 300-304). Travel in association with any future task order will be at a not-to-exceed amount and only actual and allowable travel expenses incurred by the Contractor will be reimbursed.

1.1.3 All work will be performed at the Contractor's site except when the task requires work at specific locations (e.g., MACPAC office, site visits, expert panels, etc.).

1.2 Period of Performance

- The period of performance for this contract is a base period of 12 months and four one-year option periods. The period of performance, including all options, is as follows:
 - Base Period October 1, 2015 through September 30, 2016
 - Option Period 1 October 1, 2016 through September 30, 2017
 - Option Period 2 October 1, 2017 through September 30, 2018
 - Option Period 3 October 1, 2018 through September 30, 2019
 - Option Period 4 October 1, 2019 through September 30, 2020

1.3 Fully Burdened Labor Rate Schedule and Other Direct Costs (ODCs) for Base and Option Periods

1.3.1 The offeror shall propose fully-loaded hourly rates for all personnel potentially assigned to tasks under this contract. Each offeror's rates will depend on how personnel and positions are classified within each offeror's human resources structure or classification system. However, offerors may use the following sample labor categories as general guidance on how individuals could be classified to facilitate MACPAC's review of proposals. The offeror's proposed staff should reflect the years and type of experience as specified below.

- a) Project Manager. Person responsible for the day-to-day management of the project and direction of offeror project staff. The project manager shall have at least ten years of relevant experience and a minimum of five years' experience in the management of contracts of this type, which involves multiple tasks, changing priorities, and timely action.
- b) Supervising Programmer/Analyst/Lead Investigator. Supervising programmer/analyst/lead investigator shall have at least ten years' of relevant experience and at least five years' of experience as the manager or supervisor of other programmers/analysts/researchers. Researchers should have an advanced degree in a directly relevant field and a proven track record researching Medicaid and/or State Children's Health Insurance Program (CHIP) issues.
- c) Senior Programmer/Analyst/Research Scientist. Senior programmer/analyst/research scientist shall have at least five years' experience of which at least three years must involve work directly relevant to Medicaid and/or CHIP.
- d) Policy Analyst. Mid-level policy analyst, with a Master's degree or higher, shall have at least three years' experience conducting policy research and analysis related to Medicaid and/or CHIP.
- e) Research Assistant. Entry-level analyst, typically with a Bachelor's degree in public policy, economics, statistics, or related discipline, shall have one to three years' of work experience.

- f) Programmer. Mid-level computer programmer shall have at least three years' data processing experience; experience with Medicaid and/or CHIP data preferred.
 - g) Junior Programmer. Entry-level computer programmer shall have one year of data processing experience or a four-year degree in mathematics, statistics, computer science, or a social science research discipline.
 - h) Actuary. Must possess a current Fellow of the Society of Actuaries (FSA) designation from the Society of Actuaries or a similar designation from another actuarial certifying body. The actuary must have a minimum of five years' of experience providing actuarial services regarding Medicaid and/or CHIP programs.
 - i) Senior Information Technology (IT) Specialist. Senior IT specialist shall have at least 10 years' of experience in information technology software and computer support services.
IT Specialist. Information technology specialist shall have at least three years' of experience in information technology and computer support services.
 - j) Clerical. Clerical staff or administrative support staff as needed.
- The fully burdened labor rate schedule and ODCs pricing tables below should be included in the offeror's business management and cost/price proposal. These tables may be "recreated" for inclusion in proposals, but must replicate the exact content of the pricing tables below.

Base Year: Period of Performance: 10/01/2015 through 9/30/2016

CLIN	Category	Unit	Unit Price/Rate
0001	Labor		
0002	Cost Reimbursement Materials		
0003	Cost Reimbursement Travel		
0004	Other		

CLIN	Category	Unit	Unit Price/Rate

Option Year One (1): Period of Performance: 10/01/2016 through 9/30/2017

CLIN	Category	Unit	Unit Price/Rate
1001	Labor		
1002	Cost Reimbursement Materials		
1003	Cost Reimbursement Travel		
1004	Other		

Option Year Two (2): Period of Performance: 10/01/2017 through 9/30/2018

CLIN	Category	Unit	Unit Price/Rate
2001	Labor		

CLIN	Category	Unit	Unit Price/Rate
2002	Cost Reimbursement Materials		
2003	Cost Reimbursement Travel		
2004	Other		

Option Year Three (3): Period of Performance: 10/01/2018 through 9/30/2019

CLIN	Category	Unit	Unit Price/Rate
3001	Labor		
3002	Cost Reimbursement Materials		
3003	Cost Reimbursement Travel		

CLIN	Category	Unit	Unit Price/Rate
3004	Other		

Option Year Four (4): Period of Performance: 10/01/2019 through 9/30/2020

CLIN	Category	Unit	Unit Price/Rate
4001	Labor		
4002	Cost Reimbursement Materials		
4003	Cost Reimbursement Travel		
4004	Other		

2. STATEMENT OF WORK (SOW)

2.1. PURPOSE

The statement of work (SOW) describes the types of projects for which MACPAC seeks assistance from qualified contractors under this contract. The contract will provide MACPAC with an expeditious and flexible mechanism for undertaking short and long term defined projects on a potentially wide range of topics relating to Medicaid and CHIP.

2.2 AGENCY BACKGROUND

The Medicaid and CHIP Payment and Access Commission (MACPAC) is a non-partisan legislative branch agency that provides policy and data analysis and makes recommendations to Congress, the Secretary of the U.S. Department of Health and Human Services, and the states on a wide array of issues affecting Medicaid and the State Children's Health Insurance Program (CHIP). The U.S. Comptroller General appoints MACPAC's 17 commissioners, who come from diverse regions across the United States and bring broad expertise and a wide range of perspectives on Medicaid and CHIP.

MACPAC serves as an independent source of information on Medicaid and CHIP, publishing issue briefs and data reports throughout the year to support policy analysis and program accountability. The Commission's authorizing statute, 42 U.S.C. 1396, outlines a number of areas for analysis, including:

- payment;
- eligibility;
- enrollment and retention;
- coverage;
- access to care;
- quality of care; and
- the programs' interaction with Medicare and the health care system generally.

MACPAC's authorizing statute also requires the Commission to submit reports to Congress by March 15 and June 15 of each year. In carrying out its work, the Commission holds public meetings and regularly consults with state officials, congressional and executive branch staff, beneficiaries, health care providers, researchers, and policy experts. Additional information on MACPAC and establishment of the Commission can be found at www.macpac.gov.

The Commission's deliberations and recommendations are based on MACPAC staff analysis and research as well as direction from Commissioners. This research can be quantitative (e.g., data analysis; simulations of policy options) or qualitative (e.g., literature reviews, collecting first-hand information via site visits, structured interviews, or expert roundtables) and is supported by external research contracts. MACPAC meets publicly and is required to regularly consult with states in carrying out its duties and ensure that input from states is taken into account and represented in MACPAC's recommendations and reports. MACPAC is required to examine the federal and state

budgetary implications of its recommendations. MACPAC publishes the analyses that inform its deliberations and recommendations in two annual reports to the Congress and on its website. More information on MACPAC can be found on its website at www.MACPAC.gov. Commissioners discuss policy issues and formulate recommendations. In the course of these meetings, Commissioners consider the results of staff research, presentations by policy experts, and comments from interested parties.

2.3 DESCRIPTION OF SERVICES

2.3.1 The Contractor(s) under this project shall be able to organize and implement some or all of the five listed types of projects, as described in Clause 2.5 (Discussion of Project Types and Tasks) below, on behalf of MACPAC. A description of the Commission's objectives related to these types of projects is contained in Clause 2.4 (Objective) below.

2.3.2 Under MACPAC's current IDIQ contract, between October 2012 and February 2015 there have been approximately 30 IDIQ tasks awarded to the current 15 IDIQ contractors. Awards range from approximately \$50,000 to \$300,000 per task and are generally awarded for periods of one year or less. Several tasks have had the capability of adding funds for additional related tasks (e.g., a task order to compute data from national surveys that is modified to produce additional data runs as needed). All tasks have required multiple staff members on the teams that conduct the work. Many IDIQ contractors have used subcontractors to fulfill specific task orders.

2.4 OBJECTIVE

2.4.1 MACPAC seeks to identify and contract with one or more organizations, which together possess the skills and knowledge to complete the range of identified project types on a wide variety of topics the Commission addresses on Medicaid and CHIP. Offerors may demonstrate competence in one, several, or all of the categories referenced in Clause 2.5 (Discussion of Project Types and Tasks) below.

2.4.2 MACPAC's goal is to assemble a group of Contractors possessing complementary knowledge and skill sets to facilitate MACPAC access to a range of expertise commensurate with the array of issues that the Commission must address. MACPAC does not seek to limit the Contractors chosen as a result of this solicitation to a predetermined number.

2.4.3 MACPAC will invite entities to bid on and complete specific tasks based upon the types of tasks identified in offerors' responses to this IDIQ as well as the qualifications of the individual(s) included in the task order proposals. Offerors should clearly indicate which of the project types and tasks described in section 2.5 they seek consideration for in their IDIQ proposal and document their expertise in these areas through proposed staff and corporate experience.

2.4.4 For purposes of qualifying for the IDIQ award, **only qualifications of the prime bidding organization and its staff will be considered.** In other words, qualifications of subcontractors

bid in this overall IDIQ proposal will not be considered in scoring, because MACPAC's contractual relationship is only with the prime contractor. Once awarded an IDIQ contract, however, organizations may subcontract with organizations of their choosing (including other prime contractors on this IDIQ) for specific tasks to strengthen their team for specific tasks, subject to MACPAC approval. In these specific task proposals, qualifications of the full team, including subcontractors, will be considered in scoring.

- 2.4.5** All proposals must demonstrate sufficient understanding of the role of MACPAC and the political and regulatory context in which it operates. Based upon the types of projects in which the offeror has identified an interest, proposals must demonstrate that the offeror has the requisite substantive knowledge, technical capacity, and experience to complete such projects and corresponding tasks. Substantive knowledge and technical expertise can be in any or all areas relating to Medicaid and/or CHIP policy, including understanding state programs and state operations, having experience at both the federal and state levels, and experience working with both executive and legislative agencies and offices.
- 2.4.6** Where quantitative skills are necessary (e.g., conducting data analysis, sampling for surveys), proposals must demonstrate that ability. Likewise, for projects where qualitative skills are more relevant, (e.g., convening expert panels, arranging site visits) relevant abilities and experience must be demonstrated.
- 2.4.7** Attachment B contains detailed criteria by which proposals will be judged.
- 2.4.8** The decision to pursue any of the identified project types will be made solely by the Commission's staff during the course of the contract. The Commission cannot predict its needs far in advance. Accordingly, MACPAC cannot guarantee that each individual and entity awarded a contract under this request for proposal (RFP) will in fact be chosen to complete a project under the contract. Contractors for specific tasks will be selected based on the type of project at hand and the Contractor's demonstrated expertise. IDIQ contractors selected to compete for a task will submit a technical and business proposal and tasks will be awarded based on MACPAC review of the competitors' proposals. A Contractor may refuse a task (or not bid on that task order proposal) if it is unavailable to complete the tasks within the required time frame.

2.5 DISCUSSION OF PROJECT TYPES AND TASKS

- 2.5.1 The offer must demonstrate expertise and experience in one or more of the following areas.** Offerors will not be penalized for demonstrating expertise and experience in only a subset of these five areas, nor will extra consideration be given to offerors who demonstrate expertise and experience in all five.
- 2.5.2 Convening/soliciting information from experts/stakeholders.** Offerors may demonstrate capabilities and expertise in conducting qualitative research, including but not limited to site visits, structured interviews, and expert roundtables.

- 2.5.3 Environmental scans/information syntheses.** Offerors may demonstrate capabilities and expertise in conducting literature reviews, catalogues or landscapes of Medicaid state policies, initiatives or programs, or particular topics (e.g., waivers; payment initiatives)..
- 2.5.4 Policy and data analyses.** Offerors may demonstrate capabilities and expertise in producing reports on policy options using administrative, survey, qualitative and other data sources as well as their knowledge of the history and workings of the policy being examined.
- 2.5.5 Conducting surveys and analyzing survey and administrative data.** Offerors may demonstrate capabilities and expertise in conducting surveys and using survey data to inform Medicaid and other public policy discussions. Offerors may also demonstrate their capabilities and expertise in using Medicaid and other administrative data for policy analyses.
- 2.5.6 Modeling, actuarial analysis and payment simulations.** Offerors may demonstrate capabilities in actuarial modeling of Medicaid policies, simulations of changes in Medicaid policy, or effects of implementing or repealing Medicaid payment or other policies.

2.6 HUMAN RESOURCE MANAGEMENT

2.6.1 Personnel Qualifications

- 2.6.1.1** Contractors shall provide qualified personnel with all necessary certifications and competencies to perform the requirements as specified in this contract and resulting task orders at the performance start date(s).

2.6.2 Personnel Maintenance

Contractors shall ensure continuation of services during personnel absences due to sickness, leave, and voluntary or involuntary termination from employment such that impact to MACPAC is minimal. When Contractor key personnel have been terminated, leave, or given notice of resignation to the Contractor, a notification shall be communicated to the Contracting Officer within one week of employee notice. Contractors shall provide follow-up documentation within 72 hours, describing the management corrective action taken to ensure task completion and the addition of new staff as appropriate.

2.6.3 Replacement/Substitution

- 2.6.3.1** The Contractor shall designate the key personnel necessary to the successful performance of work under task order assignments resulting from this contract. The Contractor agrees to assign these persons to the performance of work under the contract and shall not replace or substitute for such personnel without written authorization from the MACPAC Contracting Officer.
- 2.6.3.2** Prior to replacing/substituting key personnel performing on task orders under this contract, the Contractor shall notify the Contracting Officer within two weeks in advance of the proposed replacement/substitution. Notice shall include written justification for

the change and a sufficiently detailed qualification summary/resume of proposed personnel to permit MACPAC's evaluation and acceptance, as well as fully-loaded hourly rates and labor categories for proposed key personnel.

2.6.3.3 MACPAC reserves the right to disapprove of any successors to key personnel, both on the overall IDIQ contract and on any task orders issued pursuant to IDIQ contract award.

2.6.4 Financial Management – Cost Controls

2.6.4.1 Contractors shall demonstrate effectiveness in forecasting, managing, and controlling contract and task order costs. Contractors shall provide total accountability, accuracy, disclosure, control, forecasting, estimating, and overall management of all efforts at the task order level.

2.7 TASK ORDER REQUIREMENTS

2.7.1 General Information

2.7.1.1 Contractors shall provide services and perform tasks in accordance with separately issued task order assignments as specified therein. Contractors shall not start performance on any requirement until the Contracting Officer issues a task order.

2.7.2 Content

2.7.2.1 Requests for task order proposals will be prepared by MACPAC and may include a detailed description of the goals to be accomplished and desired outcomes, in the form of a Statement of Work (SOW); security instructions if any; any required MACPAC inputs; expected completion date(s); a list of deliverables; and additional data, as appropriate, to assist the Contractor in understanding the task. For firm fixed price tasks, dollar amounts will be assigned to each deliverable after award.

2.7.3 Changes/Deviations

2.7.3.1 Changes to task order contents, estimated costs, schedules and deliverables shall be documented by a revision/modification to the task order or sub-task in the same manner as the basic task order. Only the Contracting Officer may authorize changes to any resulting task order awarded under this contract.

2.7.4 PERFORMANCE MEASURES

2.7.4.1 Throughout the life of the contract, the Contractor will be evaluated on the basis of the performance measures delineated in each executed task order. Each task order will include a SOW detailing the services required. There is a 100% Acceptable Quality Level (AQL) for all required services in the SOW on each task order. The Contractor will be evaluated on the performance measures and must meet an AQL to continue services under the contract. All work described in the SOW to be delivered under each task order is subject to final inspection and acceptance by the Contracting Officer and Project Officer.

2.7.4.2 The performance measures are as follows:

Performance Metric	Required Service	Performance Indicator	Monitoring Method
Accuracy/ completeness/ technical proficiency	All work products must be complete, accurate, and conducted with techniques commensurate to the task. Analytic exercises and literature reviews must be free of errors and sufficiently comprehensive; accounts of site visits, interviews, and expert panels must accurately reflect content of proceedings. Logistical arrangements (e.g., site visits, panels, etc.) must be conducted without disruptions.	Draft and final work products are complete and accurate and were conducted in a technically-competent and appropriate manner. Work is appropriately cited, neutral in tone, and incorporates comments from MACPAC staff.	MACPAC Project Officer review of work products may include external peer review of deliverables. MACPAC reserves the right to perform any inspection and audit as deemed necessary to assure that the Contractor's services conform to prescribed requirements.
Timeliness	All work products - both interim and final - must be completed on schedule in order for MACPAC to use them most effectively.	Contractors' deliverables are provided on schedule as indicated in the task order contract unless modified with MACPAC concurrence.	MACPAC's Contracting Officer and Project Officer will review task deliverables with respect to the schedule defined in the task order.
Responsiveness	The Contractor shall be responsive to requests for clarifications on submitted work products or to refinements to the task work based on changing needs of MACPAC (within the scope of work).	The Contractor is able to provide requested information or make adjustments in task work without undue delays.	MACPAC's Project Officer will review the Contractor's ability to adjust task work in response to changing conditions, needs, and unexpected circumstances.
Communication	The Contractor shall proactively keep MACPAC apprised of all issues related to the conduct of the task including, but not limited to progress of work, any issues that affect the Contractor's ability to meet schedule or budget requirements, unforeseen logistical issues, changes to the Contractor's internal operations (e.g., personnel changes) relevant to the work, etc.	The Contractor provides both regular updates on the progress of work under the task order and notifies the Project Officer of any unanticipated circumstances that affect either the analytics / logistics of the project, the project schedule, or the project budget.	MACPAC's Project Officer will review both regular and ad hoc status reports on the applicable task order. MACPAC's Project Officer should have the ability to brief MACPAC's executive staff on the status of his/her task order project at any point in the conduct of the work.

Performance Metric	Required Service	Performance Indicator	Monitoring Method
Cost	The Contractor shall ensure that work conducted under the task order is completed within the limits of the specified budget, unless otherwise negotiated with and approved by the MACPAC Project Officer and Contracting Officer.	Work is completely and accurately performed within budget.	MACPAC's Project Officer and Contracting Officer will regularly jointly review progress toward final deliverables at each significant milestone in the task order work to ensure that the project's expenditures are commensurate with each stage of work.

2.7.5 Potential Remediation for Failure of Contractor to Meet 100% AQL

2.7.5.1 Up to 5 percent of Contractor payments may be deducted for less than full compliance with the AQL. Contractors will have an opportunity to correct nonconforming services at the expense of the Contractor, within a time period specified by the Project Officer, before MACPAC makes an equitable adjustment to the contract.

2.7.5.1.1 MACPAC reserves the right to refuse deliverables or a work product that is deemed to be deficient in one or more areas specified in the above measures.

2.7.5.1.2 MACPAC reserves the right to obtain remuneration from the Contractor for work deemed to be unusable as a result of poor quality.

2.7.5.1.3 Written acceptance, conditional acceptance, or rejection will be sent to the Contractor via email.

2.7.6 Unsatisfactory Work

2.7.6.1 Performance by the Contractor to correct defects found by MACPAC as a result of quality review and by the Contractor as a result of quality control shall be at the Contractor's own expense and without additional reimbursement by MACPAC. Unless otherwise negotiated, the Contractor shall correct or replace all nonconforming services or deliverables no later than the time and date granted by the Project Officer.

2.7.7 Quality Control

2.7.7.1 The Contractor shall submit for acceptance, along with its proposal, a Quality Control Plan (QCP) governing all potential tasks performed under this contract that contains, at a minimum, the items listed below. If applicable, the QCP should be cross-referenced in future specific task order proposals. The Contracting Officer will inform the Contractor upon notification of contract award of acceptance or required modifications to the plan. The Contractor shall make appropriate modifications and obtain MACPAC acceptance of the plan within 30 calendar days from the date of contract award.

2.7.7.2 The QCP shall include the following minimum requirements:

2.7.7.2.1 A description of the quality control system to cover all major services and deliverables. The description shall include specifics as to the scope of reviews

conducted on a scheduled and unscheduled basis, frequency of reviews, and the role/title of quality reviewers.

2.7.7.2.2 A description of the methods to be used for identifying and preventing defects in the quality of services performed.

2.7.7.2.3 A description of the records to be kept to document quality reviews and corrective or preventative actions taken.

2.7.7.3 All records of inspections performed shall be retained and made available to MACPAC upon request throughout the contract performance period, and for the period after contract completion, until final settlement of any claims under this contract.

2.7.7.4 MACPAC will evaluate the Contractor's performance in following the method of surveillance specified herein. When an observation indicates less than satisfactory performance, the Contracting Officer or other designated representative will immediately notify the Contractor, in writing, of such finding(s) and will request correction of the noted discrepancy. Any action taken by MACPAC as a result of surveillance will be according to the terms of the contract.

SECTION 2: Attachments

ATTACHMENT A

INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS - SINGLE OR MULTIPLE AWARDS

MACPAC may elect to award a single task order contract or to award multiple task order contracts or task order contracts for the same or similar services to two or more sources under this IDIQ selection process. The awards are dependent on the quality of the proposals. There is no predetermined number of qualified applicants that MACPAC will select. As stated in Section 2.4.8 above, MACPAC cannot guarantee that each individual and entity awarded a contract under this request for proposal (RFP) will in fact be chosen to complete a project under the contract.

1.0 INSTRUCTION TO OFFERORS

- a. The following instructions establish the acceptable requirements for the format and content of proposals. Offerors' special attention is directed to the requirements for technical and business proposals to be submitted in accordance with Sections 3.0 (Technical Proposal Format) and 4.0 (Business Proposal Format and Instructions) of this attachment.

2.0 GENERAL INSTRUCTIONS

- a. Any resultant contract will include the MACPAC's Contract Standard Terms and Conditions applicable to the selected offeror's organization and type of contract awarded. These are not included in this RFP because there are separate terms and conditions for university-based firms and others.
- b. The proposal shall be in two parts: a) "Volume I, Technical Proposal" and b) "Volume II, Business Management and Cost/Price Proposal." Each of these parts shall be separate and complete in itself so that evaluation of one may be accomplished independently of, and concurrently with, evaluation of the other. The technical proposal shall not contain reference to costs; however, resource information such as data concerning labor hours and categories, materials, subcontracts, etc., shall be contained in the technical proposal so that the offeror's understanding of Clause 2.0

(Performance Work Statement) may be evaluated. Page limits specified for each section are binding; font size is not prescribed, but should be sufficiently large as to permit ease of reading.

- c. The proposal shall be signed by an official authorized to bind the offeror's organization, including all content contained within the offeror's proposal. Proposals should be emailed to contracts@MACPAC.gov.
- d. Proposals shall be emailed to MACPAC by 4:00 p.m. Eastern Daylight Time (EDT) Friday, July 17, 2015. Email separate technical and business proposals to contracts@MACPAC.gov.
- e. MACPAC shall evaluate proposals in accordance with the evaluation criteria set forth in Attachment B of this RFP.
- f. Offerors' proposals must disclose the technical approach in as much detail as possible, including, but not limited to, the requirements specified in Section 3.0 (Technical Proposal Format) of this attachment. In addition, offerors must comply with the requirements of Section 4.0 (Business Proposal Format and Instructions) of this attachment.
- g. It is understood that the offeror's proposal shall become part of the official contract file.
- h. The RFP does not commit MACPAC to pay any cost for the preparation and submission of a proposal.

3.0 TECHNICAL PROPOSAL FORMAT

- a. To facilitate technical proposal evaluation, the offeror shall submit a separate enclosure entitled, "Volume I, Technical Proposal". To expedite evaluation of submitted proposals, each offeror's technical proposal shall contain the following major sections in the order listed:
 - 1. Executive Summary
 - 2. Understanding of MACPAC's Mandate and Need for Contractual Services
 - 3. Proposed Personnel Qualifications
 - 4. Management Plan
 - 5. Hypothetical Project Proposal
 - 6. Organizational Qualifications and Past Performance
 - 7. Appendix: Resumes for all proposed professional personnel
- b. To assist in preparing each section of the proposal, offerors are furnished the following information:

1. Executive Summary

- i.* This section shall consist of a brief summary of the major elements of the offeror's proposal.
- ii.* This section shall not exceed one page.

2. Understanding of MACPAC's Mandate and Need for Contractual Services

- i. This section should describe the offeror's understanding of the types of analyses that they may conduct to support MACPAC's work, and their understanding of MACPAC's role in informing Medicaid and CHIP policy.
- ii. This section shall not exceed two pages.

3. Proposed Personnel Qualifications

- i. This section (in narrative form), together with the appendix (resumes), shall contain sufficient evidence to permit evaluation of the qualifications of the proposed project staff. For additional information, consult Attachment B, Evaluation Criteria for Award. The offeror must identify which staff members would work on which project types and in which subject matter areas.
- ii. In this section, the offeror shall discuss the qualifications of the proposed personnel; describe experience, education, specific scientific or technical accomplishments, highlighting how skills would align with the needs of the particular project types proposed and the relevant substantive areas. This information shall be provided for the project team members and, if included in the hypothetical task/project, additional personnel bid on that hypothetical task. The proposal shall include (in an appendix) resumes identifying the key professional personnel that shall be employed to perform the contract, including the IDIQ project manager and other staff available to work on IDIQ tasks.
- iii. Resumes contained within the Appendix should be no more than 4 pages each. Only publications, presentations, and previous work directly or indirectly relevant (e.g., methodological work such as statistical modeling or survey design may not be related to Medicaid policy but may be relevant for specific methodological projects) to this contract should be included.
- iv. In the IDIQ proposal, the offeror shall discuss the anticipated availability of known proposed personnel and how staff would be chosen and assigned to projects under the contract.
- v. This section should be no more than ten pages (not including resumes).

4. Management Plan

- i. This section shall describe how the offeror plans to use project staff and corporate resources to complete task requests.

- ii.* As appropriate, the offeror should describe the organization and management methods it will use in the technical management of the proposed project types under the contract. Similar to the technical approach, the description of this facet of the work should demonstrate an understanding of the nature of the tasks and potential problems and how issues will be identified in a timely manner and at the proper level of authority. Further, the management plan should describe the offeror's approach for working with MACPAC staff and how any consultants, if used, will be effectively integrated into a project.
- iii.* The offeror's proposal should include a discussion of those processes and systems that will ensure valid deliverables that are satisfactorily completed within a project's time and cost projections.
- iv.* The offeror shall disclose any known and/or perceived organizational conflicts of interest that have or may have the potential to impact work conducted for MACPAC under the terms of this IDIQ. For any known and/or perceived conflicts of interests identified, the offeror should provide a strategy for mitigating each identified conflict and eliminating any potential associated risks.
- v.* The offeror shall state whether or not acceptance of a contract for this project shall impact performance of other Government contracts. If "yes," indicate the nature and extent of the impact.
- vi.* The offeror shall state whether employees, on which estimates are based presently, are on the offeror's payroll and immediately available for this work. If not, state the number and kind of persons who would have to be hired and the arrangements made to obtain them.
- vii.* The proposal must contain the names of the key staff responsible for the preparation of the proposal (e.g., the offeror's project manager for all tasks issued under the contract, or principals who will likely lead multiple tasks) and their expected time commitment to the contract. (This is distinct from the information requested in Section 2, "Proposed Personnel Qualifications," which asks for information on all of the offeror's staff who could be potentially assigned to tasks issued under this contract.).
- viii.* This section shall not exceed three pages.

5. Hypothetical Project Proposal

- i.* This section should include a technical proposal in response to a hypothetical project selected by the offeror, including a brief contextual discussion, proposed technical approach, personnel qualifications and proposed staff, and a management plan and timeline for completion. In general, MACPAC issues task orders for the shortest amount of time feasible to complete a given project, not to exceed one year from date of issue of the task order.

- ii. The hypothetical project proposal may demonstrate competency in any of the five areas listed in Section 2.5: 1) Convening/soliciting information from experts/stakeholders (site visits, structured interviews, roundtables); 2) Environmental scans/information syntheses; 3) Policy and data analyses; 4) Conducting surveys and analyzing survey and/or administrative data; and 5) Modeling, actuarial analysis and payment simulations. Only one hypothetical proposal is required and it must show expertise and competency in at least one of these five areas.
 - iii. The hypothetical project proposal must be relevant to MACPAC's mandate (see www.MACPAC.gov for MACPAC's authorizing legislation and its mandate). It should demonstrate the offeror's understanding of studies they could conduct that are relevant to Medicaid policy and could inform recommendations that Commissioners could make to Congress, the Secretary of Health and Human Services, and the states as specified in our mandate.
 - iv. Questions for which MACPAC has previously asked for input include:
 - To what extent have "advanced payment models" in Medicaid been successful at achieving goals of reduced cost, and improved access, coordination, and outcomes?
 - What payment approaches can be used to encourage appropriate use of institutional long-term services and supports? How can they be evaluated?
 - Do Medicaid enrollees have adequate access to specialty care?
 - How have state payment methods and rates and other policies (e.g., scope of practice) for health care professionals affected enrollee access to services?
 - What medical and health providers treat Medicaid patients and how does supply of these providers affect their access to care?
- These are only examples of questions that could be addressed through a proposed hypothetical project. Offerors will be evaluated both on the relevance of the question they propose to address to MACPAC's work as well as their methodology for doing so. The question should be clearly stated at the beginning of the hypothetical proposal.
- v. The hypothetical project proposal should contain sections on, and will be scored on the following criteria: 1) relevance of the problem being addressed to MACPAC's work; 2) technical approach; 3) management plan and 4) relevant experience of proposed staff. A staff loading chart with hours by task within the hypothetical project **must be included**. Failure to include the staff-loading chart will result in losing **all** points for the hypothetical project. A required separate cost estimate for the hypothetical project is described in section 4.0.
 - iii. The hypothetical project proposal should not exceed 10 pages.

6. Organizational Qualifications and Past Performance

- i.* This section shall describe the offeror's organizational experience with the skills, techniques, and substantive areas required to successfully complete the work described in this SOW. The offeror should also discuss its past performance with other government-related projects, particularly for agencies such as MACPAC. Projects may be used to document corporate experience in conducting projects in any of the five areas listed in section 2.5. A crosswalk of organizational qualifications and the areas listed in section 2.5 is not required but will assist in review of this section.
- ii.* General background, experience, qualifications, and past performance of the offeror shall be furnished. In particular, examples of previous relevant experience shall be furnished to demonstrate the offeror's capacity to fulfill the objectives of the Statement of Work.
- iii.* This information shall include the names, addresses and phone numbers of contract and technical supervision officers. Experience may have been with federal or state government, commercial and/or nonprofit organizations.
- iv.* As part of the appendix, offerors shall submit relevant Medicaid- and/or CHIP-related work samples, prepared within the last three years, to illustrate relevant organizational qualifications and past performance.
- v.* This section shall not exceed 10 pages.

7. Appendix: Resumes for all proposed professional personnel.

- i.* There is no page limit for this section. However, note that each resume should not exceed four pages as stated in Section ii. Resumes should highlight relevant project experience in each of the applicable project types listed in section 2.5.

4.0 BUSINESS PROPOSAL FORMAT AND INSTRUCTIONS

- a. To facilitate proposal evaluation, the offeror shall submit as part of the proposal a separate enclosure entitled "Business Management and Cost/Price Proposal" which presents the general proposed cost for completing the hypothetical project discussed in Section 5 of the offeror's technical proposal.
- b. General Instructions:
 2. These instructions are to assist offerors in submitting information that is required to evaluate the reasonableness of the proposed cost/price. Compliance with these instructions is mandatory and failure to comply may render an offeror's proposal ineligible for an award.
 3. All information relating to an offeror's proposed cost/price must be included in the section of the proposal designated as "Volume II, Business Management and Cost/Price Proposal". Under no circumstances shall this cost/price data be included elsewhere in the proposal. Data beyond that required by these instructions shall not be submitted, unless it is considered essential to document or support the proposed costs/prices.
 4. Note that unreasonably low or high proposed costs/prices, initially or subsequently submitted, may be grounds for eliminating a proposal from this source selection's competition. The elimination of a proposal will be based on either an offeror's lack of understanding of MACPAC's expressed requirement and/or the submittal of unreasonable costs/prices.
 5. List any exceptions taken to the cost/price requirements stated herein and provide any cost/price assumptions. Offerors shall provide complete rationales for exceptions taken and assumptions made.
- c. Volume Organization
 1. The "Volume II, Business Management and Cost/Price Proposal" shall consist of the following sections:
 - i. Table of Contents
 - ii. Glossary of Abbreviations and Acronyms
 - iii. Fully Burdened Labor Rate Schedule and Other Direct Costs
 - iv. Exceptions/Assumptions and Rationales
 - v. Hypothetical Cost Estimates
 - vi. Financial Statements
- d. Pricing Information
 1. The cost/price information for this source selection is limited to the submission of fully burdened firm fixed price (FFP) type hourly labor rates against all labor categories identified by the offeror, in response to Clause 1.3.2 of the contract, as well as indirect and profit rates applicable to Other Direct Costs (ODCs). Note however, that no fee or profit will be paid on material/travel/per diem costs.
 2. The Labor Categories and Definitions provided in the technical proposal will be considered to meet the minimum labor qualification requirements for this source selection.
 3. Fully burdened labor rates are defined as consisting of hourly base labor rates plus out-year escalations, applicable home office type indirect burden costs (fringe benefits, overhead, general & administrative), and profit. All fully burdened FFP labor rates shall be rounded to the nearest cent.

4. Only one fully burdened FFP labor rate for each labor category shall be inserted per team (either the prime Contractor's rate or a team member's rate) into the Fully Burdened Labor Rate Schedule.
5. Failure to propose labor rates for all labor categories will render an offeror's proposal incomplete and the entire proposal will be subject to rejection.
6. Fully burdened FFP labor rates shall be proposed based on the following assumptions: all labor categories and associated labor rates will be proposed in accordance with the Fully Burdened Labor Rate Schedule anticipated performance periods. The base contractual period of performance will begin October 1, 2015 and end September 30, 2020. The contractual period of performance for option periods 1 through 4 will begin October 1 annually and end September 30 annually. Only fully burdened FFP labor rates against associated labor categories per Fiscal Year shall be proposed. Travel and other expenses will be proposed at the task order level on cost-reimbursement basis (no fee or profit will be paid on reimbursements for travel and per diems). The indirect rates and profit rates applicable to ODCs will only be used for pricing future task orders.
7. Alterations to the Fully Burdened Labor Rate Schedule are not allowed. Offerors shall only insert their fully burdened FFP labor rates, indirects, profit rates, and labor category classifications.
8. Successful offerors' fully burdened FFP labor rates, indirects, and profit rates will be incorporated into resulting basic contracts as proposed against this source selection's Fully Burdened Labor Rate Schedule and will be used as maximum rates for pricing future competitive and non-competitive task orders.
9. Offerors will describe any exceptions, assumptions, and rationales for developing the Fully Burdened Labor Rate Schedule and Other Direct Costs, in response to Clause 1.3.2 of the contract.
10. MACPAC, as a not for profit organization, is exempt from all sales and use taxes imposed by the United States Federal Government and the District of Columbia.
11. Bid Price Proposals must be valid for at least ninety (90) calendar days as of the closing date of this RFP.

e. Financial Responsibility

1. Offerors shall provide the last three years of financial statements, and year-to-date financial information through the last quarter available. If audited, reviewed, compiled or certified financial statements are available, these shall be submitted.
2. Historical and year-to-date financial data shall be submitted and the ability to fund contract performance shall be addressed.

ATTACHMENT B

EVALUATION FACTORS FOR AWARD

MACPAC will perform separate technical and cost evaluations. The technical evaluation will be conducted in accordance with weighted technical criteria established and approved prior to receipt of proposals. This evaluation produces a numerical score (points). Cost proposals are evaluated to assess the reasonableness of the proposed costs and price and to determine the probable cost to MACPAC. Offerors are advised that paramount consideration will be given to the evaluation of technical proposals, rather than costs or price. To be selected for award, however, a proposal must be fairly and reasonably priced.

Proposals and corresponding content should be clearly labeled and organized to assist with MACPAC's review. In addition to the criteria below, proposals will be evaluated for overall organization, formatting, and grammatical correctness as well as compliance with required page limits and all requirements included in Attachment A. For required content, offerors may appropriately and clearly reference other sections to assist reviewers with locating relevant material. Required content that is not referenced appropriately will not be considered.

Proposals will be evaluated to determine the offeror's ability to complete all technical requirements for performance. Any proposal that addresses only part of the technical requirements may not be considered fully responsive to MACPAC's technical needs and may not be accepted. MACPAC will evaluate proposals in accordance with the following technical evaluation criteria:

1. Understanding of the policy environment in which MACPAC works and the contractor's role in supporting their work (10 points).

The offeror shall demonstrate that they understand the types of projects they will be asked to conduct and how work they would conduct under the contract fits into MACPAC's overall analytic agenda.

2. Proposed Personnel Qualifications (25 points)

- a) The project director(s) shall have demonstrated capability to manage the chosen types of projects, proven ability to provide technical guidance relevant to the tasks of the projects, and experience working on a variety of topics related to Medicaid and CHIP policy including experience at the federal and state levels. The offeror shall demonstrate, through discussion and staff resumes, that its personnel (salaried and consultants) have expert knowledge of Medicaid and CHIP policy, including health care delivery, financing, state programmatic features, and emerging trends and issues.

- b) The offeror's combined staff shall have experience in the skills needed to complete the relevant proposed project tasks (e.g., research and writing for completing research papers and literature reviews; designing data collection instruments, conducting surveys, and analyzing survey results for completing survey tasks; convening meetings and maintaining and summarizing minutes of expert panels; ability to complete policy analyses; etc.).

3. Management Plan (15 points)

- a) The offeror's proposed management plan shall clearly document the lines of authority, the approximate time commitments and responsibilities for each staff member, and procedures for ensuring that tasks and deliverables for the proposed project types will be completed within required time frames.
- b) The offeror will present a plan for managing and coordinating tasks and explain how effective communication and interaction will be accomplished among the involved contractor staff and between the staff and MACPAC.
- c) If subcontractors or consultants are to be used, the offeror will describe how they will be managed and effectively integrated into the project(s). Note that subcontractor qualifications will not be evaluated, but offerors should discuss how they would manage subcontractors if they may be used on individual tasks.
- d) The offeror will describe how it will update MACPAC staff on a regular basis when working on and completing project tasks including modes of communication and how work by subcontractors or consultants will be incorporated into updates.
- e) The offeror will include a Quality Control Plan that addresses all requirements as specified in Clause 2.8.4 (Quality Control) of the contract.

4. Hypothetical Project Proposal (30 points)

- a) The offeror shall present its proposed approach for one project task it could offer under the contract, based on the hypothetical project outlined in Attachment A, including the project's purpose and scope, methodological or data issues, as appropriate, and policy questions to be addressed and explained. The offeror shall explain how selected project tasks are appropriate for answering the hypothetical project's questions.
- b) The offeror's proposed technical approaches will explain how and which personnel will complete each discussed task in the hypothetical project in a timely, efficient and effective manner and will provide a timeline outlining completion of each project.
- c) The hypothetical task proposal must include a staff loading chart with hours by task.
- d) The offeror's technical proposal shall be clear and well-organized; the proposal will be considered representative of the written products to be provided under the contract.

5. Corporate Qualifications (20 points)

- a) The offeror will demonstrate a record of success in the types of projects it proposes to complete (e.g., managing large-scale research projects and writing research reports, conducting surveys and site visits, collecting and analyzing state administrative data, convening panels and conferences, and prior work with MACPAC or other organizations that conduct Medicaid policy analyses).

QUESTIONS CONCERNING THE REQUEST FOR PROPOSAL

Questions regarding this Request for Proposal (RFP) must be submitted via email no later than noon Eastern Daylight Time (EDT) on Friday, July 17, 2015. Offerors may email questions to: contracts@macpac.gov. MACPAC will work to answer all questions as expeditiously as possible to assist offerors with preparation of their proposals. Questions will be accepted until Wednesday, June 17th at 4:00 p.m. EST. Responses to questions posed by offerors will be issued as an amendment to the solicitation.

PROPOSAL SUBMISSION

Separate technical proposal and business management and cost/price proposals must be submitted in electronic format (either WORD or PDF) by no later than Friday, July 17, 2015 at noon EST to contracts@MACPAC.gov.

Proposals received after this date and time will be deemed late and not considered for award.